



Filing ID #10019780

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Bopha T. Malone
Status: Congressional Candidate
State/District: MA03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 01/26/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
18 Hood St. LOCATION: Lynn, MA, US	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Barclay Online Savings		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
MA PORTFOLIO 2030 (FIDELITY INDEX) LOCATION: MA		\$15,001 - \$50,000	Tax-Deferred		
Retirement Savings ⇒ Enterprise Bank and Trust Company 401k ⇒ Oakmark International Fund		\$15,001 - \$50,000	Tax-Deferred		
Retirement Savings ⇒ Enterprise Bank and Trust Company 401k ⇒ Vanguard 500 Index Fund		\$100,001 - \$250,000	Tax-Deferred		
Retirement Savings ⇒ Enterprise Bank and Trust Company 401k ⇒ Vanguard Small-Cap Index Fund		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement Savings ⇒ Fidelity IRA ⇒ FIDELITY 500 INDEX PREMIUM CLASS		\$100,001 - \$250,000	Tax-Deferred		
Retirement Savings ⇒ Fidelity IRA ⇒ FIDELITY EXT'D MARKET INDEX PREMIUM CLASS		\$15,001 - \$50,000	Tax-Deferred		
Retirement Savings ⇒ Fidelity IRA ⇒ FIDELITY INTERNATL INDEX PREMIUM CLASS		\$15,001 - \$50,000	Tax-Deferred		
Retirement Savings ⇒ Fidelity IRA ⇒ FIDELITY U.S. BOND INDEX PREMIUM CLASS		\$1,001 - \$15,000	Tax-Deferred		
Retirement Savings ⇒ uniQure 401k ⇒ Great-West S&P SmCap 600 Index Fund Inv		\$1,001 - \$15,000	Tax-Deferred		
Retirement Savings ⇒ uniQure 401k ⇒ Great-West T Rowe Price MdCp Gr Fund Inv		\$1,001 - \$15,000	Tax-Deferred		
Retirement Savings ⇒ uniQure 401k ⇒ T. Rowe Price Blue Chip Growth Adv		\$1,001 - \$15,000	Tax-Deferred		
Retirement Savings ⇒ Vanguard Trad. IRA ⇒ Vanguard 500 Index Fund		\$50,001 - \$100,000	Tax-Deferred		
Retirement Savings ⇒ Vanguard Trad. IRA ⇒ Vanguard Growth Index Fund		\$15,001 - \$50,000	Tax-Deferred		
Stocks (non-retirement) ⇒ Alnylam Pharmaceuticals, Inc. (ALNY)		\$1,001 - \$15,000	None		
Stocks (non-retirement) ⇒ Alphabet Inc. - Class A (GOOGL)		\$1,001 - \$15,000	None		
Stocks (non-retirement) ⇒ Alphabet Inc. - Class C Capital Stock (GOOG)		\$15,001 - \$50,000	None		
Stocks (non-retirement) ⇒ Apple Inc. (AAPL)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Biogen Inc. (BIIB)		\$1,001 - \$15,000	None		
Stocks (non-retirement) ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BioMarin Pharmaceutical Inc. (BMRN)					
Stocks (non-retirement) ⇒ Diageo plc (DEO)		\$1 - \$1,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Enterprise Bancorp Inc (EBTC)		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Stocks (non-retirement) ⇒ Facebook, Inc. - Class A (FB)		\$1,001 - \$15,000	None		
Stocks (non-retirement) ⇒ Federal National Mortgage Association (FNMA)		\$1 - \$1,000	None		
Stocks (non-retirement) ⇒ ISHARES NASDAQ Biotechnology ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ ISHARES TR China A ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Radius Health, Inc. (RDUS)		\$1 - \$1,000	None		
Stocks (non-retirement) ⇒ Rite Aid Corporation (RAD)		\$1 - \$1,000	None		
Stocks (non-retirement) ⇒ Simon Property Group, Inc. (SPG)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Tesla, Inc. (TSLA)		\$1,001 - \$15,000	None		
Stocks (non-retirement) ⇒ Travelzoo (TZOO)		\$1 - \$1,000	None		
Stocks (non-retirement) ⇒ Twitter, Inc. (TWTR)		\$1 - \$1,000	None		
Stocks (non-retirement) ⇒ uniQure N.V. - Ordinary Shares (QURE)		\$15,001 - \$50,000	None		
Stocks (non-retirement) ⇒ Vanguard Consumer Discretionary ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stocks (non-retirement) ⇒ Vanguard Financials ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Vanguard FTSE Emerging Markets ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Vanguard Growth ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Vanguard Health Care ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Vanguard Russell 2000 Index ETF		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Stocks (non-retirement) ⇒ Vanguard S&P 500 Index ETF		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Stocks (non-retirement) ⇒ Vanguard Total Stock Market ETF		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Walgreens Boots Alliance, Inc. (WBA)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Wal-Mart Stores, Inc. (WMT)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Stocks (non-retirement) ⇒ Walt Disney Company (DIS)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Vanguard Roth IRA ⇒ Vanguard 500 Index Fund		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Roth IRA ⇒ Vanguard Mid-Cap Index Fund		\$15,001 - \$50,000	Tax-Deferred		

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Enterprise Bank	salary		\$83,700.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year
uniQure, Inc.	spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Lesley University
Board Member	Lowell General Hospital
Board Member	Community Teamwork Inc. (CTI)
Board Member	Rotary Club of Bedford
Executive Committee Member	Working Cities Challenge Lowell
Trustee	Trustees of the Ayer Home
Trustee	Middlesex Community College
Board Member	Girls Inc. of Greater Lowell
Board Member	Cambodian Mutual Assistance Association (CMAA)
Board Member	Women Working Wonders

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Retirement SavingsRetirement Savings ⇒ Enterprise Bank and Trust Company 401kRetirement Savings ⇒ Fidelity IRARetirement Savings ⇒ uniQure 401kRetirement Savings ⇒ Vanguard Trad. IRAStocks (non-retirement) LOCATION: US

- Vanguard Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Bopha T. Malone , 01/26/2018